



Filing ID #10022516

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Mrs. Karen Powers Mallard  
**Status:** Congressional Candidate  
**State/District:** VA02

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 05/14/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AM Funds Global SC Fund [MF]		\$1,001 - \$15,000	None		
Bank of America NA RASP [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Barclays AG Bd Idx Port [MF]		\$1,001 - \$15,000	None		
Blackhawk Low Duration Bond Fund CL C [MF]	SP	\$1,001 - \$15,000	None		
Blackhawk Low Duration Bond Fund CL C [MF]	SP	\$1 - \$1,000	None		
Blackrock Advantage Global Fund INC A [MF]	SP	\$15,001 - \$50,000	None		
Blackrock Advantage Global Fund INC C [MF]	SP	\$1 - \$1,000	None		
Blackrock Advantage LRG CAP Core Fund CL A [MF]	SP	\$1 - \$1,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Blackrock Advantage LRG CAP Core Fund CLC [MF]	SP	\$1 - \$1,000	None		
Blackrock Capital Appreciation FD, INC A [MF]	SP	\$1,001 - \$15,000	None		
Blackrock Capital Appreciation FD, INC C [MF]	SP	\$1 - \$1,000	None		
Blackrock Equity Divident FD A [MF]	SP	\$1,001 - \$15,000	None		
Blackrock Equity Divident FD C [MF]	SP	\$1 - \$1,000	None		
Blackrock Global Allocation FD INC A [MF]	SP	\$1,001 - \$15,000	None		
Blackrock Global Allocation FD INC C [MF]	SP	\$1 - \$1,000	None		
Blackrock Hi Yld Bd Portfolio Class A [MF]	SP	\$1,001 - \$15,000	None		
Blackrock High Yld Bond Port Class C [MF]	SP	\$1 - \$1,000	None		
Blackrock International FD A [MF]	SP	\$1,001 - \$15,000	None		
Blackrock International FD jC [MF]	SP	\$1 - \$1,000	None		
Blackrock Strategic Income Opps PTF C [MF]	SP	\$1 - \$1,000	None		
Blackrock Strategic Income Opps PTFA [MF]	SP	\$1 - \$1,000	None		
Blackrock Total Return Fund CL A [MF]	SP	\$1,001 - \$15,000	None		
Clearbridge Agg Gr Port [MF]		\$1,001 - \$15,000	None		
Harris Oakmart Intrrntnl [MF]		\$1 - \$1,000	None		
Invesco Mid Cap Value [MF]		\$1,001 - \$15,000	None		
Invesco Small Cap Growt [MF]		\$1 - \$1,000	None		
Metlife Small Cap Val [MF]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Mt/wellXCOEquity Opp [MF]		\$1,001 - \$15,000	None		
Total Return Fund CL C [MF]	SP	\$1 - \$1,000	None		
TR Rowe LgCpGr [MF]		\$1,001 - \$15,000	None		
TRP Mid Cap Growth [MF]		\$1 - \$1,000	None		
Virginia Retirement System [DB]		Undetermined	None		
Walmart Inc. (WMT) [ST]		\$1 - \$1,000	None		
Walt Disney Company (DIS) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Wstrn Asst Mgt Strad Bd [MF]		\$1 - \$1,000	None		

\* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

### SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Chesapeake Public Schools	salary	\$23,367.00	\$60,630.00
Spouse	Spouse Salary	\$26,671.00	\$70,000.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
DC	Chartway Federal Credit Union	May 2017	Truck loan	\$10,000 - \$15,000
JT	Nationstar Mortgagae	April 1998	Mortgage on home in Virginia Beach, VA	\$100,001 - \$250,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
President	Floyd E. Kellam High School PTSA

<b>Position</b>	<b>Name of Organization</b>
Director	Tidewater Blackhawks Showcase Baseball

#### **SCHEDULE F: AGREEMENTS**

None disclosed.

#### **SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE**

None disclosed.

#### **EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION**

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

Yes  No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

Yes  No

#### **CERTIFICATION AND SIGNATURE**

I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Mrs. Karen Powers Mallard , 05/14/2018